DOCUMENT RESUME

ED 216 733 JC 820 226

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TITLE Institutional Management through Organization Development.
PUB DATE 8 Jul 81
NOTE 43p.; Materials presented to the Transatlantic Institute (Oxford, England, July 8, 1981).

EDRS PRICE MF01/PC02 Plus Postage.
DESCRIPTORS *Administrative Organization; *College Administration; *College Planning; Community Colleges; Departments; *Organizational Development; Power Structure; Two Year Colleges
IDENTIFIERS *Florida Junior College

ABSTRACT

This paper provides information on the role of organizational development in the institutional planning process at Florida Junior College (FJC), using short statements on the functions and objectives of each of the major components within the planning process. First, an overview is provided of organizational development and its value in establishing and maintaining the college's mission and goals, and in improving management efficiency, communications, and employee morale. Next, institutional planning is defined and the requirements for effective planning are identified as formal structure, flexibility, comprehensiveness, and coordination. The five major components of institutional planning at FJC are then listed (i.e., educational development, facilities, information systems development, financial, and college planning) and their interrelationships are illustrated through models and charts. After the management of organizational development at FJC is examined, the paper concludes by delineating the components of FJC's organizational development plan: (1) departmentation (i.e., the delegation of authority and responsibility within the organization); (2) the legal basis for authority and responsibility; (3) functional analysis and grouping of activities; (4) departmental organization; (5) operational responsibilities of departments; (6) departmental goals; (7) departmental objectives; (8) staffing patterns; and (9) job descriptions. (HB)

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ED216733

INSTITUTIONAL MANAGEMENT THROUGH ORGANIZATION DEVELOPMENT

Presented to the TransAtlantic Institute
July 8, 1981
Oxford, England

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JC 820 226

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ORGANIZATION DEVELOPMENT

Recognizes the dynamic nature of organizations.

Provides a format for accommodating orderly, organizational change.

Provides a planning tool for describing department organizational structure in terms of what is and what could be.

Is an Action Plan.

Is a component of FJC's formal planning process.

HISTORICAL DEVELOPMENT OF ORGANIZATION DEVELOPMENT AT FJC

Need for Organization Development.
Introduction of the Concept.
Where we are today with Organization Development at FJC.

ORGANIZATION DEVELOPMENT PLANNING IS OF VALUE IN THAT IT:

Provides a process for the development and maintenance of FJC's philosophy, mission, goal, and objective statements.

Reduces the disruptive nature of organizational change by providing a strategy for reacting to probable and possible future events and changes.

Provides a framework for the process of goal setting, prioritization of work, and allocation of resources.

Provides an action-oriented problem solving methodology.

Improves the efficiency and effectiveness of institutional management.

Clarifies departmental span of control.

Provides a basis for employee performance appraisals.

Improves communications.

Improves employee morale.

INSTITUTIONAL PLANNING

INSTITUTIONAL PLANNING IS:

Deciding what to do and how to do it.

A process for obtaining and providing information to support decision making.

A process for deciding upon a course of action in order to make something happen, which without planning, might not have happened.

Directional; it establishes goals and guides for action.

A most important management function.

Thinking about the future in a disciplined manner.

TO BE EFFECTIVE, INSTITUTIONAL PLANNING MUST:

Contain measures, obtainable objectives and dates or time schedules.

Establish accountability.

Involve all decision makers and not be assigned to a single department or committee.

Have an institutional commitment from the board and top level administration.

Evolve from a logical and consistent structure.

Convince people it will help them perform better.

Be information based.

THE KEY WORDS OF INSTITUTIONAL PLANNING AT FJC ARE:

FORMALIZED

FLEXIBLE

COMPREHENSIVE

COORDINATED

MAJOR COMPONENTS OF INSTITUTIONAL PLANNING AT FJC ARE:

Educational (Program) Development Plan

Facilities Plan

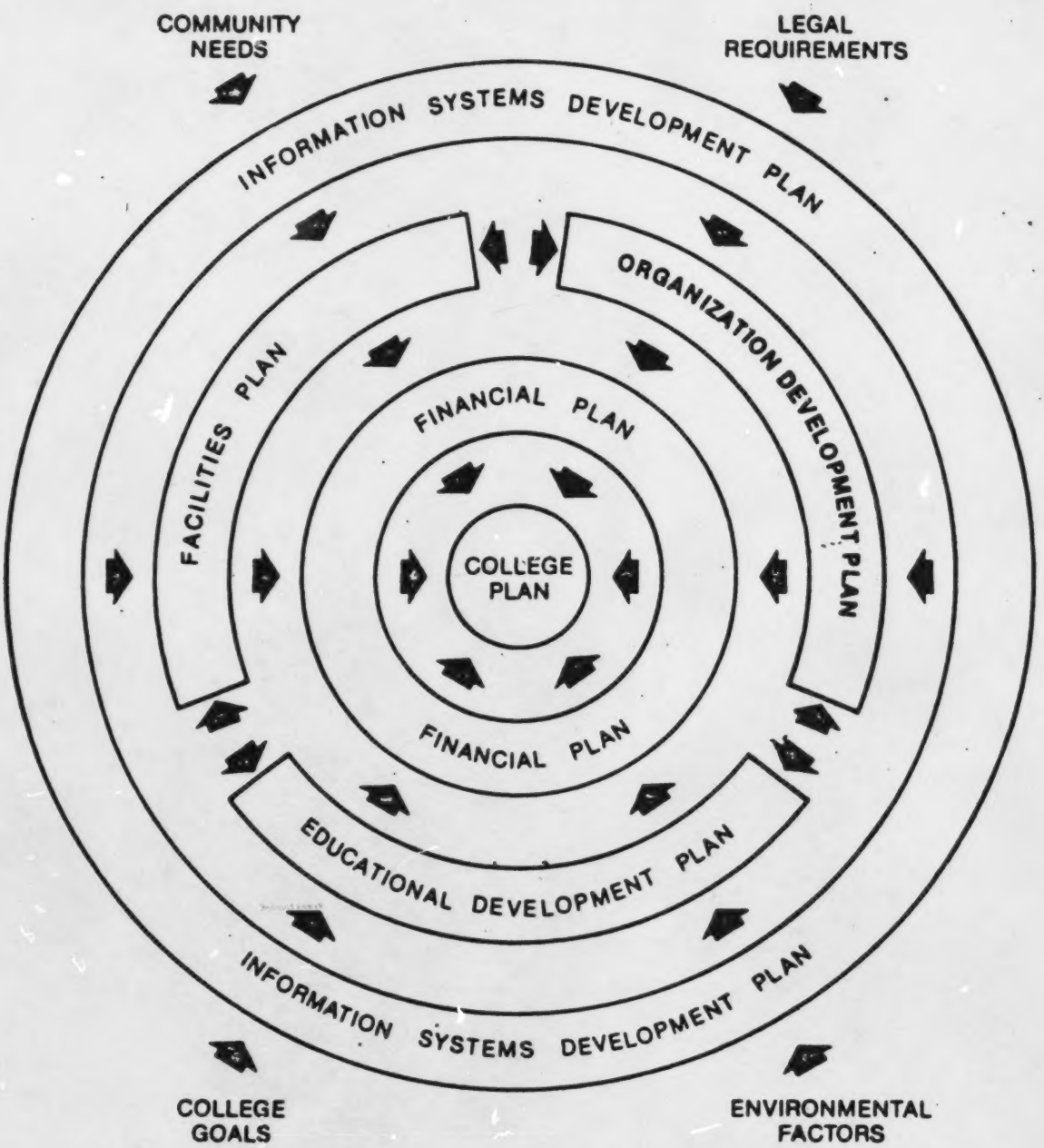
Information Systems Development Plan

Organization Development Plan

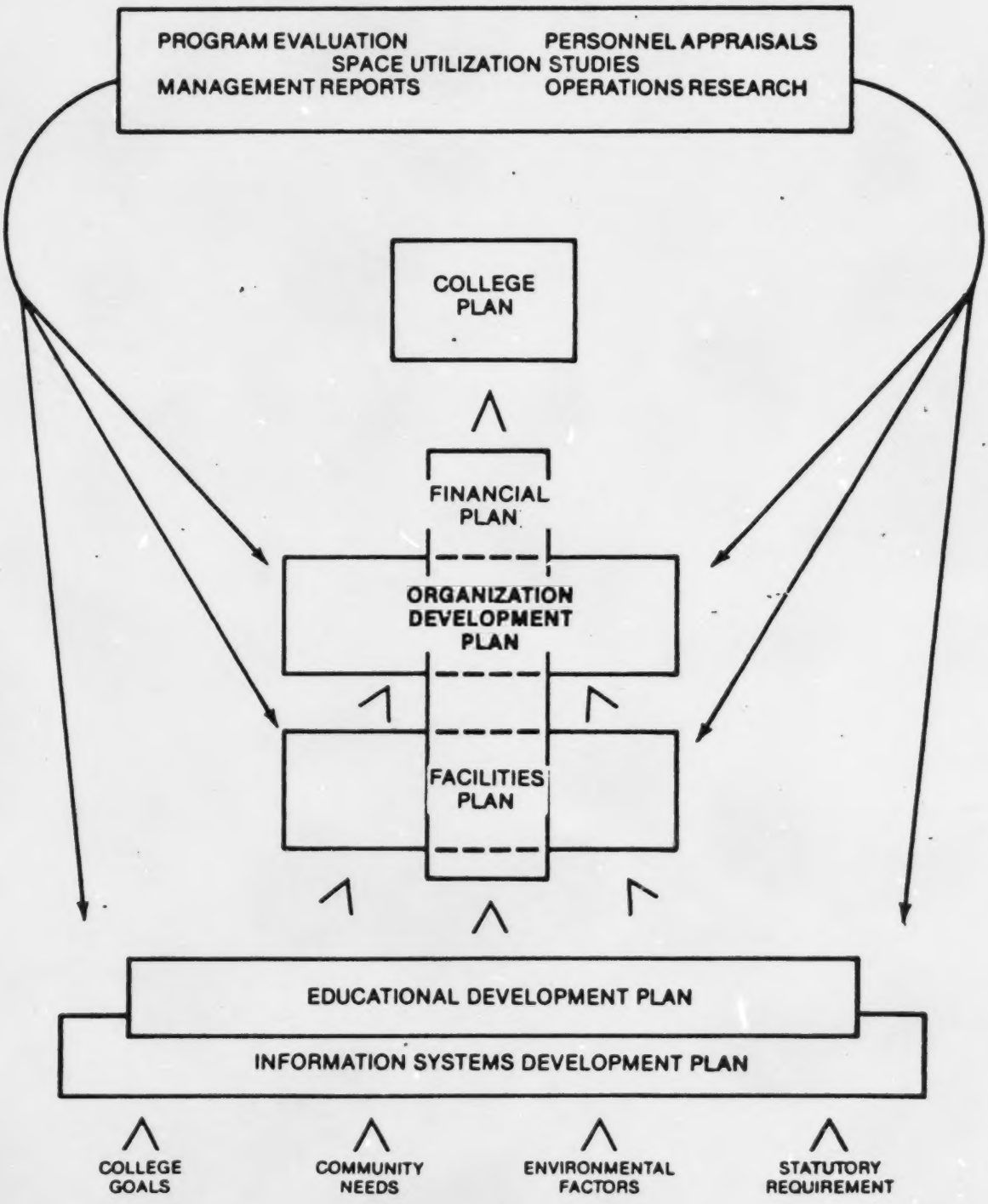
Financial Plan

The College Plan

CONCEPTUAL MODEL



FLOWCHART OF THE INSTITUTIONAL PLANNING PROCESS



ORGANIZATION DEVELOPMENT

MANAGEMENT OF ORGANIZATION DEVELOPMENT AT FJC:

The President has assigned general responsibility for the institutional planning process to the Executive Vice President.

The six (6) major components of the institutional planning process are integrated into the on-going operations of the College. Key administrators provide leadership for each planning component.

The Executive Vice President and the Director of Staff and Program Development jointly plan, develop, and evaluate the Organization Development planning process.

Department heads (associate vice presidents, deans, directors, and business managers) annually develop OD Plans prior to the budget planning process, and submit them to the head of the major administrative unit.

Department goals and objectives as defined in department OD Plans are approved through regular administrative channels with final action by the President's Cabinet.

The Executive Vice President provides administrative approval on matters related to personnel, funding, space, and equipment.

MANAGEMENT OF ORGANIZATION DEVELOPMENT AT FJC

—CONTINUED—

The timely flow of information through the following reports is critical to the effective management of Organization Development at FJC:

1) Brief monthly activity reports;
2) Quarterly status reports on the progress of department objectives;
3) A college annual report which includes statements on the accomplishments of the objectives contained in **The College Plan.**

The SPD staff provides technical assistance to:

1) The Executive Vice President in the planning and development of the OD planning process;
2) Department heads in the development of their OD Plans;
3) The evaluation of the OD planning process.

Financial support for Organization Development at FJC is provided through the annual operating budget of the responsible administrative unit.

COMPONENTS OF THE ORGANIZATION DEVELOPMENT PLAN:

Section A:	THE PROCESS OF DEPARTMENTATION
Section B:	LEGAL BASIS
Section C:	FUNCTIONAL ANALYSIS AND GROUPING
Section D:	DEPARTMENT ORGANIZATION CHART
Section E:	OPERATIONAL RESPONSIBILITIES OF THE DEPARTMENT
Section F:	DEPARTMENT GOALS
Section G:	DEPARTMENT OBJECTIVES
Section H:	DEPARTMENT STAFFING PATTERNS
Section I:	JOB DESCRIPTIONS

SECTION A: DEPARTMENTATION

Departmentation is the delegation of authority and responsibility within an organization.

Departmentation usually results in:

- The creation of administrative work units of manageable size.
- A more efficient distribution of the work.
- A greater utilization of work specialization.

Departmentation helps shape an organization in terms of centralization or decentralization.

Departmentation at FJC is based on function and geography (service area).

STAFF AND PROGRAM DEVELOPMENT

1.0 ADMINISTRATION
Director of Staff and Program Development
R. Terrell

- **6.0 GRAPHICS**
- **7.0 PUBLICATIONS**

2.0 STAFF DEVELOPMENT
Asst. to the SPD Director for Staff Development
S. Berg

2.1 Management

2.2 In-Service Education Programs

2.3 University Graduate Programs

2.4 Educational Leave Programs

3.0 PROGRAM DEVELOPMENT
Asst. to the SPD Director for Program Development
P. Presha

3.1 Management

3.2 Instructional Design Projects

3.3 Instructional Support Projects

3.4 Instructional Research Projects

4.0 INTERNATIONAL/ INTERCULTURAL EDUCATION
Asst. To the SPD Director for International/Intercultural Education
C. Hoffman

4.1 Management

4.2 Staff Exchanges

4.3 International/Intercultural In-Service Training

4.4 Group Study Abroad Programs

4.5 International/Intercultural Education Program Development

5.0 ORGANIZATION DEVELOPMENT
Asst. to the SPD Director for Organization Development
B. Lembcke

5.1 Management

5.2 Organizational Planning

5.3 Institutional Climate

5.4 Management Development

SECTION B: LEGAL BASIS

A listing of statutes and rules that specifically assign **authority** and/or **responsibility** to the department:

Florida or Federal Statutes

State Board of Education Rules

District Board of Trustees Rules

SECTION B: LEGAL BASIS

STATUTES, STATE BOARD OF EDUCATION (SBE), AND DISTRICT BOARD OF TRUSTEES RULES

Many departments have statutes and rules that specifically assign authority and/or responsibility to the department for its operations. Please provide below a list of all appropriate statutes, SBE, and District Board of Trustees rules that assign specific authority and/or responsibility to the department.

MAU College Administration Level III Department Staff and Program Development

SBE 6A-14.29 Staff and Program Development Funds
SBE 6A-14913 Guidelines for Staff and Program Development Plans and Activities
FJC District Board of Trustees Rule 6Hx7:

- 1.11 Philosophy, Mission Statement and Institutional Goals.
- 3.33 Professional Leave and Extended Professional Leave.
- 4.11 Royalties.
- 12.1 Staff and Program Development Mission Statement.
- 13.2 Institutional Relationship and Professional Associations.

SECTION C: FUNCTIONAL ANALYSIS AND GROUPING

Functional analysis assists department heads to identify, analyze, and organize department activities, tasks, services and/or programs into a reasonable span of control of five (5) to eight (8) major functions.

Functions are based on:

1) singleness of purpose,
2) similarity of activity,
3) a body of knowledge, and/or
4) other common elements

Instructional **major** functions are:

1) divisions,
2) academic programs,
3) disciplines, and/or
4) areas of concentration

Instructional **sub**-functions are:

1) courses or activities related to programs or areas of concentration, or
2) service courses or activities not related to programs or areas of concentration.

SECTION C: FUNCTIONAL ANALYSIS AND GROUPING

—Continued—

Non-Instructional major and sub-functions are activities, tasks, and services that are grouped because of their singleness of purpose and/or similarity of the activity.

Each department has one major function called "Administration" (executive-type management activities).

Major functions may have a "Management" sub-function (routine, day-to-day management-type activities).

SECTION C.1: FUNCTIONAL ANALYSIS AND GROUPING

MAU College Administration Level III Department Staff and Program Development

Major Function Sub-Function	Definition of general purpose and scope. Description of activities, tasks, services, or course offerings.
(2.0 STAFF DEVELOPMENT, CONT.)	
2.2 In-Service Education Program	2.2 Provide FJC sponsored workshops; fund employee expenses to attend selected off-campus workshops; coordinate staff internships and visiting professor programs; develop & monitor FJC consultant resources.
2.2.1 Professional Trends Programs (PTP)	2.2.1 Create and convene PTP Advisory Committees to determine workshop objectives and competencies; submit PTP Plans to SPD Advisory Committee; select consultants; coordinate workshop arrangements and process all payments and other documents; coordinate workshop promotion and evaluation.
2.2.2 Workshop Grant Programs	2.2.2 Advertise workshop opportunities; review, select, and monitor Workshop Grant Plans; process payments and other documents; evaluate programs.
2.2.3 Internship Programs in Business, Industry or Education	2.2.3 Develop internship opportunities in business, industry, government, and education; promote internships; submit candidates to SPD Advisory Committee, Office of the President, and District Board of Trustees for review; coordinate and monitor internship details; conduct orientation meetings for all interns; evaluate programs.

a. Current X b. Recommendation for FY 83_____; FY 84_____.

SECTION C.1: FUNCTIONAL ANALYSIS AND GROUPING

MAU College Administration Level III Department Staff and Program Development

Major Function Sub-Function	Definition of general purpose and scope. Description of activities, tasks, services, or course offerings.
1.0 ADMINISTRATION	**1.0 The purpose of this function is to provide executive leadership and direction essential to administer the resources, activities, tasks, and services of Staff and Program Development.**
1.1 Goals and Objectives	1.1 Develop department goals and objectives; develop and implement activities that comply with approved goals and objectives.
1.2 Budget	1.2 Develop the annual budget; monitor all budget expenditures; review monthly budget reports and recommend appropriate budget amendments.
1.3 Personnel	1.3 Screen, interview, select, supervise and evaluate personnel; implement staff development activities as needed.
1.4 Space and Equipment	1.4 Assess space and equipment needs; develop a plan for acquiring and maintaining appropriate space and equipment.
1.5 Policies and Procedures	1.5 Develop appropriate administrative and office policies and procedures for ensuring efficient and effective operations.
1.6 Records Management	1.6 Develop and monitor an efficient and effective records managment system.
1.7 Committees	1.7 Represent SPD on ad-hoc and standing committees, as requested.
1.8 Supervision	1.8 Assign and monitor work and assignments to ensure SPD goals, objectives, activities, tasks, and services are implemented as assigned, and in accordance with established College policies and procedures.
1.9 Evaluation	1.9 Conduct needs assessments; prepare monthly, quarterly and annual status reports; assess department goals and objectives against institutional goals and objectives; develop and implement activity evaluation instruments and processes.

a. Current X b. Recommendation for: FY 83_____ ; FY 84_____.

SECTION D: ORGANIZATION CHART

- The organization chart is a graphic illustration of the functional organization of the department.

The organization chart is a diagram of the relationship of major functional components and the deployment of key personnel within the department.

FINANCE

1.0 ADMINISTRATION
Associate Vice President
of Finance
J. Spears

2.0 SYSTEMS
Systems Officer
J. Bullard

2.1 Management

2.2 Control

2.3 Development

2.4 Implementation

2.5 Communication

2.6 Coordination

3.0 BUDGETING
Budget Officer
A. Ashby

3.1 Management

3.2 Coordination

3.3 Implementation

3.4 Development

3.5 Control

4.0 COLLECTIONS
Collections
Officer
J. Mayberry

4.1 Management

4.2 Collections &
Skiptracing

4.3 Restrictions &
Disenrollments

4.4 Coordination &
Supervision

5.0 PURCHASING
Director of
Purchasing
W. Taylor

5.1 Management

5.2 Buying Section

5.3 Contract
Administration

5.4 Document
Production

6.0 ACCOUNTING
Director of
Accounting
R. Spiwak

6.1 Management

6.2 General
Accounting
Operations

6.3 Revenue
Accounting

6.4 Student
Accounts
Receivable

6.5 Data Input
Control

6.6 Accounting
Support
Operations

6.7 Coordination &
Supervision

7.0 PAYROLL & DISBURSE-MENTS
Director of
Payroll &
Disbursements
A. Haley

7.1 Management

7.2 Project
Accounting

7.3 Accounts
Payable

7.4 Risk
Management

7.5 Reports

7.6 Coordination

a. Current ___X___ b. Recommendation for FY 83_____; FY 84_____.

SECTION E:
OPERATIONAL RESPONSIBILITIES

Department operations are usually defined and limited by the responsibilities and authority delegated directly to it.

The statement of operational responsibilities is a brief description of the department's:

- Primary purpose or mission.
- Budget development and management responsibilities.
- Personnel responsibilities.
- General scope of responsibilities and relationships to other administrative units.
- Advisory groups, councils, and/or committees.
- Rules and/or administrative procedures.
- Other special responsibilities or considerations.

SECTION F: DEPARTMENT GOALS

Goals are long range statements that are general or global in nature and concerned with ultimate outcomes.

When properly stated, goals:

- Are directional.
- Express ultimate hopes that guide the efforts of the department.
- Should recognize the total responsibility of the department as delineated by the functional components.
- Define directions toward which the department desires to move.
- Are long range aims which cannot be fully realized in a single budget cycle.
- Represent a logical extension of college goals at the department level.
- Will need to be supported by objectives and action plans.

SECTION F. 1: DEPARTMENT GOALS

MAU College Administration Level III Department Staff and Program Development

1. To provide staff development opportunities that will result in a well-qualified, competent staff.

2. To provide technical and financial assistance that will result in the development of new and improved instructional programs, individual courses, and systems, processes, materials, and research which will make it possible for the College to meet the needs of students who represent a wide-range of socio-economic backgrounds and have diverse abilities and interests.

3. To provide technical and financial assistance that will result in a coordinated international/ intercultural education program.

4. To provide the technical assistance in the development of an Organization Development planning process that will a) enable the College to develop and maintain its stated philosophy, mission, goals and objectives, b) provide a framework for goal setting and prioritization of work, and resource allocation, and c) provide a process for accommodating orderly, organizational change.

a. Current X b. Recommendation for FY 83 _____ ; FY 84 _____.

SECTION G:
DEPARTMENT OBJECTIVES

Department objectives represent the special accomplishments the department expects to achieve in one year or one budget cycle.

To be effective, department objectives must be:

Measureable.

Expressed in terms of expected outcomes, end results, and/or observable performance.

When combined college-wide, department objectives become institutional objectives reported annually in **The College Plan.**

SECTION G:
DEPARTMENT OBJECTIVES

—Continued—

Each objective statement is clearly stated and fully described by:

The major function with which it is related.

The department and other staff directly responsible for its achievement.

The anticipated completion date.

A concise statement of the measurement to be used when the completion date has passed describing whether or not the objective has been achieved as stated.

The code number from **The College Plan.**

THE COLLEGE PLAN: OBJECTIVE CODES

(P) PROFILE

- P- 1.0 Development of Philosophy, Mission, Goals
- P- 2.0 Major Developments or Clarification of Rules and Procedures
  - P-2.1 District Board of Trustees
  - P-2.2 All Personnel
  - P-2.3 Faculty
  - P-2.4 Career
  - P-2.5 Administrators
  - P-2.6 Students
- P- 3.0 Strengthening of Internal Management
- P- 4.0 Improvements in Salary Administration
- P- 5.0 Major Thrusts
- P- 6.0 Self-Study/Accreditation/Accountability
- P- 7.0 Improvement of Communications
- P- 8.0 Appointments to Major Positions
- P- 9.0 Strengthening of Community Relations
- P-10.0 Students Served

(S) SPECIAL PROBLEMS, DECISIONS AND PRIORITIES

- S- 1.0 Objectives to Address Special Problems
- S- 2.0 Major Decisions To Be Made In 1980-81
- S- 3.0 Priorities for Expenditures
- S- 4.0 Implications for Future Planning

(G) GOALS

SECTION G.1: DEPARTMENT OBJECTIVES

MAU College Administration Level III Department Staff and Program Development

Major Function	Objective Statement	Staff Response	Time-Frame	Description of Performance Measure	College Plan Obj. Code
2.0	Conduct a staff development needs assessment of all current full-time employees and develop skill development workshops that meet the needs as evidenced in the survey.	Terrell	6/81	Provide a copy of the survey instrument and a report of the survey findings; provide a list of workshops offered and a list of workshop dates, places, leaders, participants and evaluation reports.	G-18
5.0	Develop a Management Development Plan to assist College managers to improve and develop their management techniques.	Terrell	6/81	Provide a copy of the Management Development Plan approved by the President's Cabinet.	G-18
4.0	Organize an International Education Advisory Committee composed of representatives from the local community who have exhibited an interest in and a commitment to international understanding and cooperation.	Terrell	6/81	Provide a report that includes a list of Committee members, a statement of the purpose of the Committee, and a list of objectives the Committee expects to accomplish the first year of operation.	G-16
4.0	Conduct a survey of the international trade community in the City of Jacksonville to determine how FJC can assist them in meeting their needs.	Terrell	6/81	Provide a copy of the survey instrument and participant list, and a report of its findings.	G-16

a. Current X b. Recommendation for FY 83_____ ; FY 84_____.

SECTION H: STAFFING PATTERN

The staffing pattern is a description, **by major function**, of all department staff, and includes:

- Job classification title.
- Incumbent's name.
- Personnel position directory code.
- Position pay grade/step.
- Funding source (Fund 1 or 2).
- Position equivalency (percentage of time an employee works in each major function).
- Position duration (Fund 2 only).

SECTION H.1: STAFFING PATTERN

MAU College Administration Level III Department Staff and Program Development

Major Function Staff Development Number 2.0

Position Classification Title Incumbent's Name (Initial, Last Name)	Position Code No.	Pay Grade/ Step	Fund 1 or 2	Position Equivalence						Position Duration (Fund 2 only)
				Adminis.		Career		Instruc.		
				FT	PT	FT	PT	FT	PT	
Director, Staff and Program Development—R. Terrell	ADAA1000	OO/XXX	1	10%						
Administrative Assistant III S. Berg	ADAG1001	OO/XXX	1			100%				
Staff & Program Development Specialist—W. Saddler	ADAG1004	OO/XXX	1			50%				
Staff & Program Development Specialist—S. Wilson	ADAG1005	OO/XXX	1				*100%			
Senior Clerk B. Moses	ADAG1011	OO/XXX	1			100%				

a. Current X b. Recommendation for FY 83 ____ ; FY 84 ____.

*PERMANENT PART-TIME POSITIONS

SECTION I: JOB DESCRIPTIONS

Job descriptions provide a full display of the content and objectives of a position by defining its:

Basic function or role.

Characteristic and unique duties and responsibilities.

Skills and competencies required to effectively perform the job.

SECTION I: JOB DESCRIPTIONS

—Continued—

Job descriptions are essential to the effective management of the department by helping:

Managers analyze and improve the organization structure and efficiency by providing information about the distribution of the department's work load.

Employees understand better the scope and ramifications of their own and other positions.

Supervisors evaluate and train employees based on assigned tasks, duties, and responsibilities.

Job applicants understand job expectations in terms of job benefits and job requirements.

Job descriptions explain and clarify who is responsible for what within the department's organization.

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